

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:
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Post-Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☐ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
- ☐ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): The Heritage Foundation

Travel date(s): November 16, 2017 - November 17, 2017

Name of accompanying family member (if any): _____

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate <input checked="" type="checkbox"/> Actual Amount	\$32.20	\$139 +tax	\$95.37	\$15 Pen, notebook, subject matter materials

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate <input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): See attached

11/30/17
(Date)

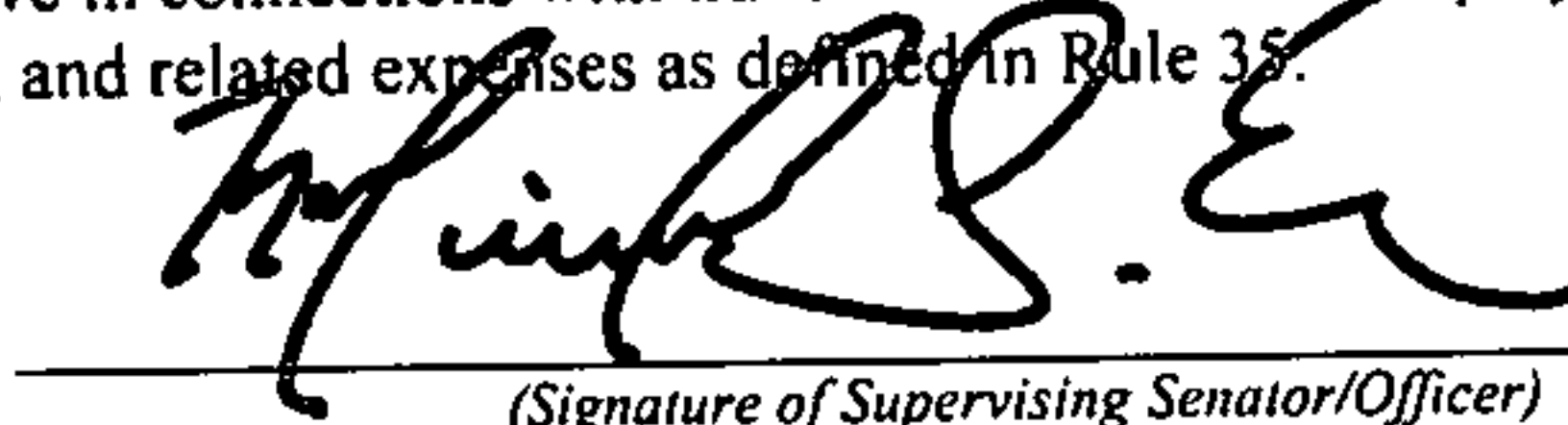
Jacob Hart
(Printed name of traveler)


(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

11/30/17
(Date)


(Signature of Supervising Senator/Officer)

Date/Time Stamp:

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Jacob Hart

Name of Traveler: _____

Office of Senator Mike Lee

Employing Office/Committee: _____

The Heritage Foundation

Private Sponsor(s) (list all): _____

11/16/17 - 11/17/17

Travel date(s): _____

Note: If you plan to extend the trip for any reason you must notify the Committee.

Richmond, Virginia

Destination(s): _____

Explain how this trip is specifically connected to the traveler's official or representational duties:

Among the lectures in the Emerging Leaders 2-17 Retreat, emerging issues # 1, "Legal Immigration Reform, Border Security & Immigration Enforcement" and emerging issues #4 "Top National Security Threats Facing the US" will help me in my capacity as a Legislative Correspondent for Foreign Affairs and Defense for Senator Mike Lee.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

10/17/2017

(Date)


(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

Senator Mike Lee

Jacob Hart

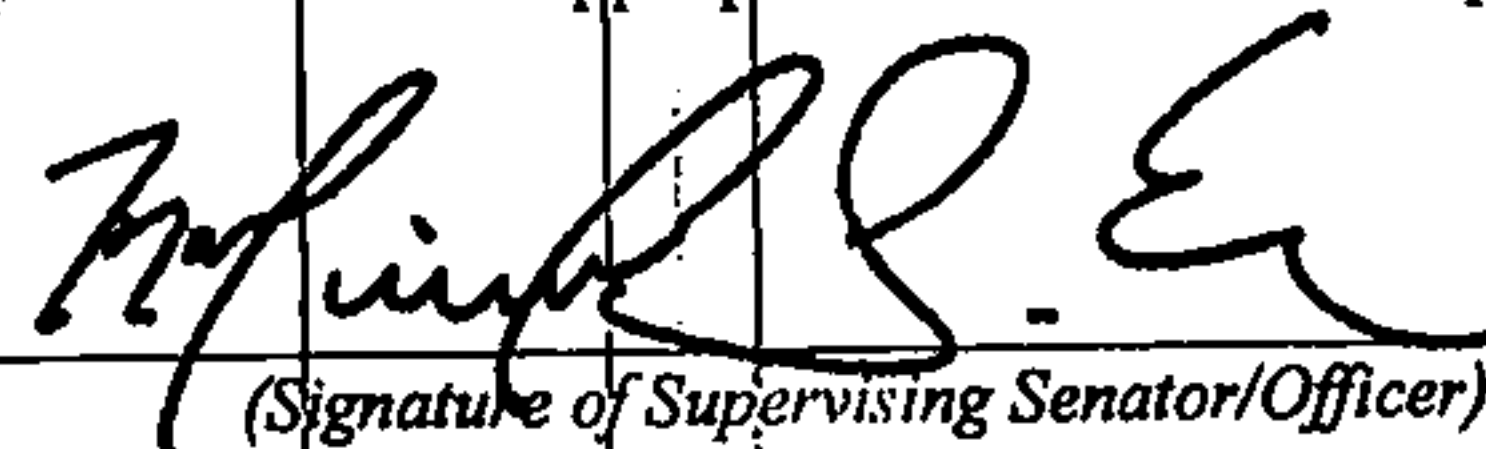
I, _____ hereby authorize _____
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

10/17/2017

(Date)


(Signature of Supervising Senator/Officer)

Emerging Leaders Conference 2017

Thursday, November 16 – Friday, November 17, 2017

Omni Richmond | Richmond, Virginia

– AGENDA –

THURSDAY, NOVEMBER 16, 2017

- 10:00 – 10:45 a.m. **LUNCH PICK-UP & ATTENDEE CHECK-IN** *The Heritage Foundation*
Attendees leave luggage at the bus after check-in
Boxed lunches will be available in Schaul Conference Center
- 10:45 a.m. **ATTENDEES BOARD BUS**
- 11:00 a.m. **BUS DEPARTS THE HERITAGE FOUNDATION**
- 1:30 p.m. **BUS ARRIVES AT OMNI RICHMOND**
- 1:30 – 2:30 p.m. **REGISTRATION, WELCOME & LEADERSHIP EXHIBIT** *Omni Richmond*
Attendees check-in to overnight rooms and then gather
to participate in the informational exhibits highlighting
Heritage educational programs and leadership materials
- 2:30 – 3:30 p.m. **EMERGING ISSUE #1 –** *James River Salon D*
Legal Immigration Reform, Border Security &
Immigration Enforcement

David Inserra
Policy Analyst, Homeland Security
The Heritage Foundation
- 3:30 – 4:30 p.m. **EMERGING ISSUE #2 –** *James River Salon D*
Welfare Reform, Economic Growth & the Impact of
Federal Policies

Moderator: Tim Chapman
Chief Operating Officer
Heritage Action for America

Salim Furth
*Research Fellow, Macroeconomics
The Heritage Foundation*

4:30 – 4:45 p.m.

BREAK

4:45 – 5:45 p.m.

**EMERGING ISSUE #3 –
Top National Security Threats Facing the U.S.**

James River Salon D

Dakota Wood
*Senior Research Fellow, Defense Programs, Center for National Defense,
Davis Institute for National Security and Foreign Policy,
The Heritage Foundation*

5:45 – 6:30 p.m.

LIGHT RECEPTION/BREAK

Atrium Balcony

6:30 – 8:30 p.m.

**DINNER & KEYNOTE ADDRESS
Lessons on Leadership from a Former USAF
Thunderbirds Commander**

James River Salon C

J.V. Venable
*Former U.S. Air Force Thunderbirds' Commander and
Senior Research Fellow for Defense Policy, Center for National Defense,
Davis Institute for National Security and Foreign Policy,
The Heritage Foundation*

FRIDAY, NOVEMBER 17, 2017

9:00 a.m.

BREAKFAST BUFFET OPENS & LUGGAGE DROP-OFF *Outside Salon D*
Attendees bring their luggage to the Heritage Luggage Drop

9:30 – 10:30 a.m.

BREAKFAST *James River Salon D*
President Reagan on Leadership, A Historical Perspective

Moderator: John Hilboldt
*Director, Lectures & Seminars, External Relations
The Heritage Foundation*

Craig Shirley

American Author of Four Best-Selling Books on President Reagan

10:30 – 11:30 a.m.

**EMERGING ISSUE #3 –
Designing a Free Market Agriculture Policy**

James River Salon D

Moderator: Tommy Binion

Director, Congressional and Executive Branch Relations

The Heritage Foundation

Daren Bakst

Research Fellow in Agriculture Policy

The Heritage Foundation

11:45 a.m.

BUS DEPARTS OMNI

11:55 a.m.

BUS ARRIVES AT BLUE BEE CIDER

12:00 – 1:30 p.m.

**LUNCHEON AND EMERGING ISSUE #4 –
Is Free Speech Dead on College Campuses?**

Blue Bee Cider

Arthur Milikh

Associate Director, B. Kenneth Simon Center for Principles and Politics

The Heritage Foundation

1:30 p.m.

CONFERENCE CONCLUDES

Attendees board bus

2:00 p.m.

BUS DEPARTS BLUE BEE CIDER

4:30 p.m.

BUS ARRIVES AT THE HERITAGE FOUNDATION

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

- | | | |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|
| 1. | Sponsor(s) of the trip (please list all sponsors): | The Heritage Foundation |
| 2. | Description of the trip: | Richmond, VA |
| 3. | Dates of travel: | 11/16/17- 11/17/17 |
| 4. | Place of travel: | Richmond, VA |
| 5. | Name and title of Senate invitees: | Please see attached |
| 6. | <p>I <i>certify</i> that the trip fits one of the following categories:</p> <p><input checked="" type="checkbox"/> (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal <u>and</u> do not retain or employ registered lobbyists or agents of a foreign principal <u>and</u> no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee <i>at any point</i> throughout the trip.</p> <p style="text-align: center;">- OR -</p> <p><input type="checkbox"/> (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (<i>see question 9</i>).</p> | |
| 7. | <p><input checked="" type="checkbox"/> I <i>certify</i> that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.</p> <p style="text-align: center;">- AND -</p> <p><input checked="" type="checkbox"/> I <i>certify</i> that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.</p> | |
| 8. | <p>I <i>certify</i> that:</p> <p><input checked="" type="checkbox"/> The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for <i>de minimis</i> lobbyist involvement.</p> <p style="text-align: center;">- AND -</p> <p><input checked="" type="checkbox"/> The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (<i>see question 9</i>).</p> | |

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

- OR -

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

- OR -

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Heritage Foundation is the sole sponsor of the trip and is solely responsible for the execution of it.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

The Heritage Foundation is a research and educational institution whose mission is formulate and promote conservative public policies. This retreat is part of that educational mission.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

The Heritage Foundation hosted a similar retreat to this one last year. Additionally, Heritage has hosted numerous staff level retreat connected to educational fellowships as well as an annual member level retreat for members of the House.

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15.	Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):
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The Heritage Foundation hosts around 400 events on Capitol Hill each year. These include educational				
fellowship, topical briefings, and working groups.				

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$27	\$139	\$11/16: \$43 \$11/17: \$40 Total: \$83	\$15- Pen, notebook, subject matter materials

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

The event is arranged specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Richmond, VA is easily accessible from Washington, and is an appropriate distance from Washington to				
ensure focus on the educational benefits of the trip.				

19. Name and location of hotel or other lodging facility:

The Omni Richmond

20. Reason(s) for selecting hotel or other lodging facility:

The Omni has adequate facilities and meeting space for a group this size.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The daily expenses meet the federal per diem rate for Richmond, VA.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Attendees will travel in a charter bus.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor: Bridgett Wagner

Name and Title: Bridgett Wagner, Vice President

Name of Organization: The Heritage Foundation

Address: 214 Massachusetts Ave NE Washington, DC 20002

Telephone Number: 202-546-4400

Fax Number: _____

E-mail Address: bridgett.wagner@heritage.org

Emerging Leaders 2017 Retreat

Thursday, November 16, 2017 – Friday, November 17, 2017

Omni Richmond Hotel | Richmond, VA

INVITATION LIST

About the List: The following individuals were extended an invitation to The Heritage Foundation's Emerging Leaders 2017 Retreat due to their interest in conservative policy making and their status as emerging leaders

Bailey	Jake	Senator Tom Cotton				Legislative Assistant
Bathon	Mary	Senator Mike Lee				Legislative Assistant
Batie	Cicely	Senator Deb Fischer				Legislative Correspondent
Call	Kelsey	Senator Mike Lee				Staff Assistant/Intern Coordinator
Chaudoin (McCabe)	Katie	Senator David Perdue				Legislative Correspondent
Chestnut	Annie	Senator Ron Johnson				Legislative Correspondent
Davis	Rachael	Senate Committee on Small Business and Entrepreneurship				Staff Assistant
Dwyer	Kaitlyn	Senator John Neely Kennedy				Legislative Correspondent
Evans	Rodney	Senator Mike Lee				Legislative Correspondent
Farr	Michael	Senator Joni Ernst				Legislative Aide
Farris	Adam	Senator James Lankford				Legislative Assistant
Finer	Jonathan	Senator Cory Gardner				Legislative Correspondent
Fisher	Sam	Senator Pat Toomey				Press Assistant
Foster	Steven	Senator Steve Daines				Legislative Aide
Garand	Brian	Senator Bill Cassidy				Staff Assistant
Gordon	Ariel	Senator Ted Cruz				legislative correspondent
Hansen	Carolyn	Senator Mike Lee				Legislative Correspondent
Hart	Jacob	Senator Mike Lee				Legislative Correspondent
Haymans	Parker	Senator Lisa Murkowski				Legislative Correspondent
Hetzel	David	Senator Chuck Grassley				Legislative Correspondent
Hinojosa	Alec	Senate Health, Education, Labor, and Pensions Committee				Research Assistant

Hunter	Kate	Senator Tim Scott					Legislative Correspondent
Jackson	Adrienne	Senator James Inhofe					Legislative Correspondent
Johnson	Mac	Senator James Lankford					Legislative Correspondent
Krell	Kaitlin	Senator John Barrasso					Legislative Correspondent
Kros	Grant	Senator Deb Fischer					Staff Assistant
Kumar	Harry	Senator Marco Rubio					Legislative Assistant
LaJoie	Taylor	Senator Mike Lee					Legislative Correspondent
Lauterbach	Jennifer	Senator John Neely Kennedy					Legislative Correspondent
Lavery	Emily	Senator Tim Scott					Deputy Legislative Assistant
Lewis	Katherine	Senate Health, Education, Labor, and Pensions Committee					Research Assistant
Lord	Anne	Senator Ben Sasse					Staff Assistant
Mahan	Jesse	Senator James Lankford					Legislative Aide
Mathis	Jenna	Senator Ron Johnson					legislative correspondent
McCabe	Katie	Senator David Perdue					Legislative Correspondent
McCullough	Noah	Senate Republican Whip					Policy Assistant
Minnich	Tyler	Senator Pat Toomey					Legislative Assistant
Mitchell	Andrew	Senator John Cornyn					Legislative Correspondent
Moore	Nick	Senator Luther Strange					Legislative Assistant
Mulkin	Elliott	Senator Ted Cruz					Legislative Correspondent
Mulopulos	Sam	Senator Rob Portman					Legislative Assistant
Orr	Caleb	Senator Marco Rubio					Legislative Assistant
Overland	Abbey	Senator Joni Ernst					Legislative Assistant
Parsons	William	Senator Steve Daines					Legislative Correspondent
Peake	Katie	Senate Richard Shelby					Staff Assistant
Peterson	Margaret	Senator Joni Ernst					Legislative Correspondent
Pierce	Rob	Senator Rob Portman					Press Assistant
Poirier	Sara	Senator Susan Collins					Director of Constituent Correspondence
Poulos	Bethany	Senator Marco Rubio					Legislative Aide
Pyron	Rob	Senator John Hoeven					Legislative Correspondent
Rankin	Duncan	Senator Luther Strange					Legislative Correspondent
Rankin	Charles	Senator Luther Strange					Legislative Correspondent
Robinson	Erinn	Senator Marco Rubio					Press Assistant
Sacasa	Ted	Senator Marco Rubio					Legislative Aide
Sandler	Gabe	Senator Chuck Grassley					Legislative Correspondent
Schelch	Johanna	Senator John Thune					Deputy Scheduler

